
Guidelines for Vendor Review Cycles

These guidelines clarify estimated vendor turnaround time for research that has been sent for fact checking. The time varies depending on the type of research sent for review.

These "guidelines" are a suggested best practice and can be modified for special circumstances. The guidelines apply to soon-to-be-published research that mentions specific vendors or other named companies in a published piece. The author(s) are responsible for determining whether a piece needs outside review and ensuring it takes place. At their discretion, they may provide the entire document or just the applicable paragraph(s).

Vendor review is the last step before a document is edited and published. It primarily is focused on checking the facts in the document. The intent is to give the vendor a final opportunity to correct any factual errors.

Research sent for review is in draft format and is strictly for internal review by the vendor. Under no circumstances is external distribution or press notification permitted.

Contact Points

One critical and difficult issue that transcends review time is the identity of the actual reviewer at a vendor location. For vendors, best practices in this area include creating an e-mail alias (analyst.relations@vendor.com) that can be checked regularly by a variety of responsible people regardless of vacations or other factors. In the absence of this best practice, vendors should provide a current contact.

Gartner does not publish "editorial calendars" or other agenda planning notices, but rather relies on as-needed vendor review according to the following schedule:

FirstTakes — For up to 360 words of content about an event or announcement that is fewer than five-days old, we provide "review" copies for factual error checking only.

- Vendors receive at least four hours of review time during the working hours of their headquarters location (longer, where feasible, at analyst's discretion). After the four-hour period expires, posting occurs at 4 p.m. US Eastern Time each day.

Findings - Findings provide a quick summary of ideas for analysts to share with clients prior to providing full analysis.

- Two business days.

Event Documents — for time-sensitive documents that are reactions to industry events.

- Twenty-four hours of vendor/company review.



Standard Documents (including Case Studies)

- Two business days — does not include Magic Quadrant, Vendor Ratings and MarketScope documents.

Magic Quadrants, Vendor Ratings and MarketScopes

- A draft of the specific vendor sections and the entire graphic will be sent to the vendor for factual review. The vendors will have a five-business day deadline to provide written comments from fact review. A vendor may schedule a 30-minute call with the analyst to discuss the facts. A courtesy copy of the final draft will be sent to all vendors at the time of publication.

Vendor-specific presentations — Powerhouse presentations (and similar single-vendor/ company presentations)

- One week, but the week falls prior to editorial submission, and not prior to the event or CD production.
- Single slides that focus on the vendor or company: 48 hours.

Strategic Analysis Reports and Focus Reports (longer than 14,000 characters)

- One week

Gartner Dataquest Statistics (statistics and market share-related research)

- No requirement to reveal the full content, one week of review on vendor-specific content. Preferably, this happens during the actual data collection phase -- i.e., vendor should discuss with the analyst or otherwise respond within a week.
- A copy of the final draft is sent to the vendor t24 hours prior to publication -- a notice for the vendor's PR department. To avoid premature publication, the information is embargoed and includes only the vendor's own data (including market share). This applies to the top-tier vendors in a region as well as any that have dramatically changed and/or moved from the top tier.

Changes to Guidelines

Gartner, Inc. reserves the right to change its guidelines at any time, without notice. These guidelines are for informational purposes only and do not constitute a waiver with respect to any of Gartner, Inc.'s rights, all of which are specifically reserved. The guidelines in their most current form will be available on www.gartner.com under the Vendor Relations link.

Source: Research Methodology (18 November 2005)